

# HealthShare Referral Manager Clinical Viewer Quick Reference Guide

*Community Care Referral and Authorization | August 2023*

## HealthShare Referral Manager

**HealthShare Referral Manager (HSRM)** is an electronic referral and authorization processing system used by the Department of Veterans Affairs (VA) to accelerate Veterans' access to community care. HSRM allows VA, third-party administrators (TPAs), and community providers to better manage community care referrals and authorizations. HSRM facilitates a reduction in turnaround time for processing referrals, providing care, submitting claims, and receiving payment. This quick reference guide (QRG) is one of several guides that will help users get the most out of HSRM.

## Quick Reference Guide Topics

- » Clinical Viewer and HSRM
- » Locate a Referral
- » Using Clinical Viewer
- » Help with HSRM

## Clinical Viewer and HSRM

The Clinical Viewer portal offers users a comprehensive view of a Veteran's medical documentation history in HSRM. Categories of information available in Clinical Viewer include clinical summaries of the patient's history, allergies, immunizations, medications, lab results, procedures, and more. HSRM uses the Veterans Data Integration and Federation Enterprise Platform (VDIF-EP) to gather and consolidate patient history information. The information is filtered into relevant categories in Clinical Viewer. This gives HSRM users a secure, centralized source for the medical history and patient details of a Veteran in HSRM.



- » *Note: The following security groups do not have access to Clinical Viewer: VA View Only, VA Reporting Only, VA Print Only, Community Care Network (CCN) 1 – 6, Community View Only, TriWest, VA Claims Adjudication and Reimbursement (CAR) Staff, and VA CAR Supervisor.*

## Locate a Referral


HSRM allows users to locate referrals quickly and manage them according to their priority. When logging in to HSRM, the Referral List screen—which is also the home screen—appears. Users can treat the Referral List as a to-do list, as it shows all of the referrals from VA in a central location. Users can locate a specific referral using the Referral List.

The Referral List contains a sorting feature that allows users to quickly organize referrals based on a variety of criteria.


*To locate a referral using the Referral List:*

1. Select the **Menu** icon  at the top left of the screen.
2. Select **Referral List** from the drop-down menu to navigate to the **Referral List** screen.
3. Locate the referral by sorting the list (e.g., Last Name, First Name), or by using the **Find Referrals** or **Find Referral by Patient** search features, both of which are available by selecting the **Menu** icon  on any screen in HSRM.
4. Select the row of the referral to view the referral details.

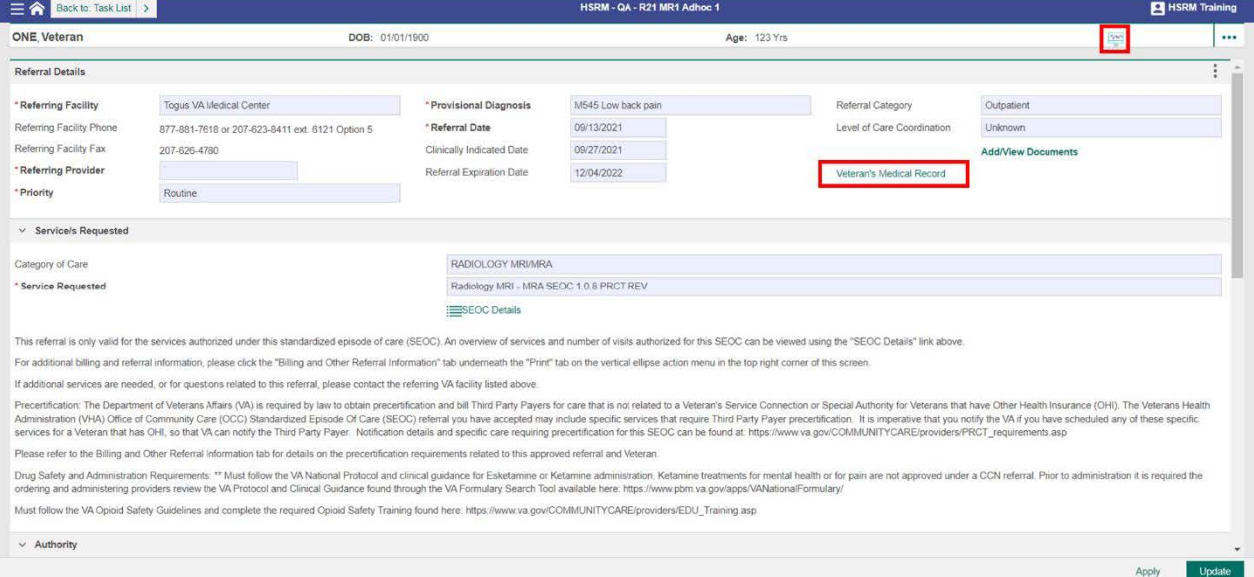
## Using Clinical Viewer

Clinical Viewer is accessible from the Referral Details screen for any Veteran that has relevant data in the system. The Clinical Viewer icon  will be available on the Patient Banner to access patient data.

*To access Clinical Viewer:*

1. Locate the Veteran's referral (see the **Locate a Referral** section of this guide).
2. Select the **Clinical Viewer** icon  on the Patient Banner or select the **Veteran's Medical Record** link on the **Referral Details** screen.

*Exhibit 1: Referral Details Screen*



3. If the user selects the Clinical Viewer icon, a menu on the right side of the screen will open. Select the **Veteran's Medical Record** option. Alternatively, if the user instead selects the **Veteran's Medical Record** link in the **Referral Details** section of the screen, it will bypass the menu in **Exhibit 2** and take user directly to Clinical Viewer.

## Exhibit 2: Clinical Viewer Access Menu

The screenshot shows the 'Veteran's Medical Record' page for ONE Veteran (DOB: 01/01/1900, Age: 123 Yrs). The page is titled 'HSRM - QA - R21 MR1 Adhoc 1'. The 'Referral Details' section includes:

- Referring Facility:** Togus VA Medical Center
- Referring Facility Phone:** 877-881-7818 or 207-623-9411 ext. 6121 Option 5
- Referring Facility Fax:** 207-626-4780
- Referring Provider:** [Redacted]
- Priority:** Routine
- Provisional Diagnosis:** J059 Acute upper respiratory infection, unspecified
- Referral Date:** 10/25/2022
- Clinically Indicated Date:** 10/31/2022
- Referral Expiration Date:** 12/28/2022
- Referral Category:** [Redacted]
- Level of Care Coordination:** [Redacted]
- Veteran's Medical Record:** [Redacted]

The **Services Requested** section shows:

- Category of Care:** PULMONARY
- Service Requested:** Pulmonary Function Testing SEOC 1.4.3
- SEOC Details:** [Redacted]

Below the services section, there is a disclaimer: 'This referral is only valid for the services authorized under this standardized episode of care (SEOC). An overview of services and number of visits authorized for this SEOC can be viewed using the "SEOC Details" link. For additional billing and referral information, please click the "Billing and Other Referral Information" tab underneath the "Print" tab on the vertical ellipse action menu in the top right corner of this screen. If additional services are needed, or for questions related to this referral, please contact the referring VA facility listed above. Pre-certification: The Department of Veterans Affairs (VA) is required by law to obtain pre-certification and bill Third Party Payers for care that is not related to a Veteran's Service Connection or Special Authority for Veterans Administration (VHA) Office of Community Care (OCC) Standardized Episode Of Care (SEOC) referral you have accepted may include specific services that require Third Party Payer pre-certification. It is imperative that services for a Veteran that has OHI, so that VA can notify the Third Party Payer. Notification details and specific care requiring pre-certification for this SEOC can be found at: <https://www.va.gov/COMMUNITYCARE/gp>. Please refer to the Billing and Other Referral Information tab for details on the pre-certification requirements related to this approved referral and Veteran. Drug Safety and Administration Requirements: \*\* Must follow the VA National Protocol and clinical guidance for Esketamine or Ketamine administration. Ketamine treatments for mental health or for pain are not approved for ordering and administering providers review the VA Protocol and Clinical Guidance found through the VA Formulary Search Tool available here: <https://www.pbm.va.gov/apps/VANationalFormulary/>. Must follow the VA Opioid Safety Guidelines and complete the required Opioid Safety Training found here: [https://www.va.gov/COMMUNITYCARE/providers/EDU\\_Training.asp](https://www.va.gov/COMMUNITYCARE/providers/EDU_Training.asp)

The **Authority** section is at the bottom.

- The **Clinical Summary** page will open, displaying an overview of the patient's medical history in HSRM. This is the home screen for Clinical Viewer. Specific categories of information available for viewing are in a list called the **Chartbook**, as shown in **Exhibit 3**. Select one of the categories in the Chartbook to view it.

## Exhibit 3: Clinical Viewer Home Screen

The screenshot shows the 'Clinical Viewer Home Screen' for HSRM - QA - MR7 Adhoc 2. The page is titled 'HSRM Training'. The **Chartbook** is on the left, with 'Clinical Summary' selected. The main content area displays:

- Diagnoses:** A table with columns: Diagnosis, Type, Last Updated.
 

Diagnosis	Type	Last Updated
PROPHY VACC STREP PNEU	PRIMARY	01/20/2012 09:15
VACCINATION FOR DTP-DTAP	SECONDARY	01/20/2012 09:15
VACCIN FOR INFLUENZA	SECONDARY	01/20/2012 09:15
HYPERKINETIC SYND NOS	PRIMARY	01/13/2012 09:30
OTH UNSP COUNSEL	PRIMARY	01/10/2012 14:36
- Allergies:** A table with columns: Allergen, Reaction, Source, Category, Last Updated.
 

Allergen	Reaction	Source	Category	Last Updated
PENICILLIN			DRUG	11/09/2011 11:45
- Medications:** A table with columns: Medication, Dose, Start Date, Details.
 

Medication	Dose	Start Date	Details
PRIMARY CARE REFERRAL/NOPC		01/13/2012 09:58	
BACK/JOINT		12/08/2011 08:44	
Non-Formulary Drug Request Primary Care		12/08/2011 08:54	
Women's Health/NOPC		12/08/2011 08:44	
EXERCISE CLEARANCE		11/10/2011 10:28	
- Lab Results:** A table with columns: Order, Results, Collection Date, Details.
- Diagnostic Studies:** A table with columns: Study, Ordering Clinician, Order Date, Test Date, Status.
- Documents [ Across All Episodes ]:** A table with columns: Document, Source, Facility, Event Date, Details.
 

Document	Source	Facility	Event Date	Details
Consult Report				
Progress Note				

» *Note: All information in Clinical Viewer is read-only, so users will not be able to print or download any information or documentation. Attempting to save images or data from Clinical Viewer may present security risks. Users must remove any saved data or images from their device after use.*

The user group that employs HSRM to directly access Clinical Viewer is known as **HealthShare (HS) Clinical Viewer**. Upon logging in to HSRM, they will see a **Patient Find** search that allows them to look up patients with a variety of criteria, including demographic and patient record information. After the user generates a search, a list of patients that meet the search criteria is displayed on the screen.

*Exhibit 4: Patient Find Screen*



On most Chartbook pages, the information available to the user will appear in a list. There are multiple ways to adjust the lists to find specific items, including using the sorting feature.

*To sort a list in Clinical Viewer:*

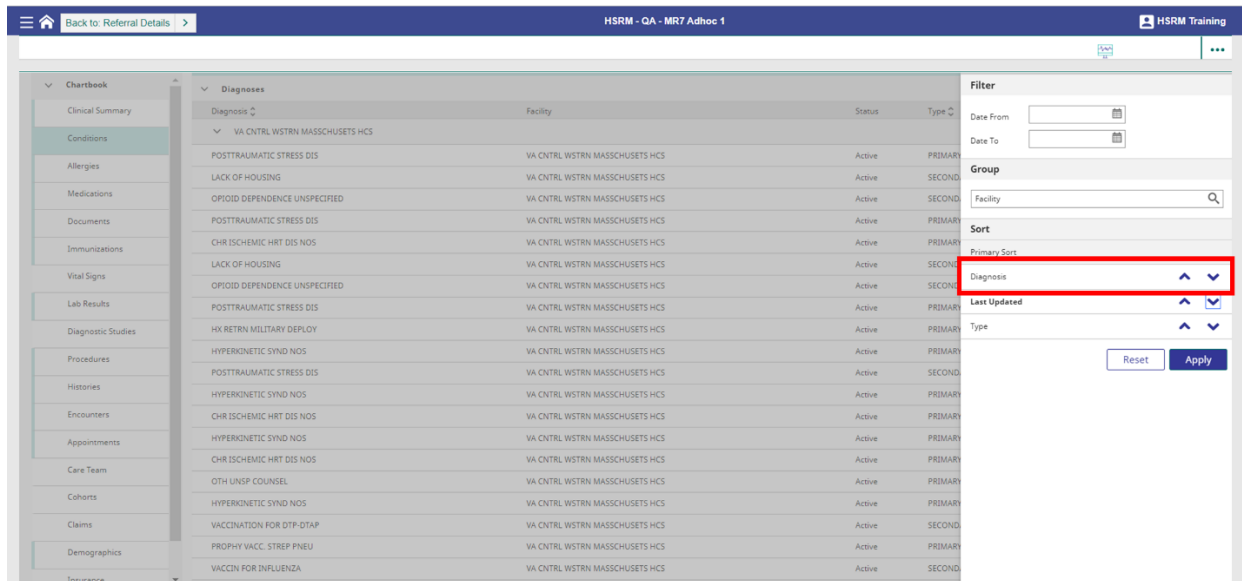
1. Select the **Sort** icon  at the top of the list.

*Exhibit 5: Sorting a List*


Diagnosis	Facility	Status	Type	Last Updated
VA CNTRL WSTRN MASSCHUSETS HCS				
POSTTRAUMATIC STRESS DIS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY	11/09/2011 10:50
LACK OF HOUSING	VA CNTRL WSTRN MASSCHUSETS HCS	Active	SECONDARY	11/09/2011 11:56
OPIOID DEPENDENCE UNSPECIFIED	VA CNTRL WSTRN MASSCHUSETS HCS	Active	SECONDARY	11/09/2011 11:56
POSTTRAUMATIC STRESS DIS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY	11/09/2011 11:56
CHR ISCHEMIC HRT DIS NOS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY	11/10/2011 10:13
LACK OF HOUSING	VA CNTRL WSTRN MASSCHUSETS HCS	Active	SECONDARY	11/15/2011 15:53
OPIOID DEPENDENCE UNSPECIFIED	VA CNTRL WSTRN MASSCHUSETS HCS	Active	SECONDARY	11/15/2011 15:53
POSTTRAUMATIC STRESS DIS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY	11/15/2011 15:53
HR RETRN MILITARY DEPLOY	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY	12/22/2011 08:30
HYPERKINETIC SYND NOS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY	12/02/2011 09:30
POSTTRAUMATIC STRESS DIS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	SECONDARY	12/08/2011 10:00
HYPERKINETIC SYND NOS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY	12/08/2011 10:00
CHR ISCHEMIC HRT DIS NOS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY	12/08/2011 08:00
HYPERKINETIC SYND NOS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY	12/15/2011 15:30
CHR ISCHEMIC HRT DIS NOS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY	01/09/2012 08:40
OTH UNSP COUNSEL	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY	01/10/2012 14:36
HYPERKINETIC SYND NOS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY	01/13/2012 09:30
VACCINATION FOR DTP-DTAP	VA CNTRL WSTRN MASSCHUSETS HCS	Active	SECONDARY	01/20/2012 09:15
PROPHY VACC. STREP PNEU	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY	01/20/2012 09:15
VACCIN FOR INFLUENZA	VA CNTRL WSTRN MASSCHUSETS HCS	Active	SECONDARY	01/20/2012 09:15

2. Select the **Ascending**  or **Descending**  options to sort the information by any available category. Users can also use the **Secondary Sort** option (if applicable) to sort the data in each category if multiple sorting options are available.

*Exhibit 6: Sorting Options*





The screenshot displays the HSRM Clinical Viewer QRG interface. On the left is a sidebar with a 'Chartbook' menu containing various categories like Clinical Summary, Conditions, Allergies, etc. The main area shows a table of 'Diagnoses' with columns for Diagnosis, Facility, Status, and Type. The 'Diagnosis' column lists various medical conditions, and the 'Type' column lists categories like PRIMARY, SECOND, and THIRD. On the right, a 'Filter' sidebar is visible, containing 'Date From' and 'Date To' fields, a 'Group' search bar, and a 'Sort' section. The 'Sort' section has a 'Primary Sort' dropdown menu with 'Diagnosis' selected and highlighted by a red box. Below it are 'Last Updated' and 'Type' options. At the bottom of the sidebar are 'Reset' and 'Apply' buttons.

3. Select the **Apply** button . The list will sort according to the chosen criteria.

In addition to sorting a list, users can filter by **Date From** and **Date To** for results within a specific time period.

*To filter by date:*

1. Select the **Sort** icon  at the top of the list.
2. Populate the **Date From** and **Date To** fields and select the **Apply** button . The list will only display results within that specific time frame.



## Exhibit 7: Filter by Date

The screenshot shows the HSRM Clinical Viewer interface. On the right, the 'Filter' panel is open, with the 'Date From' and 'Date To' fields highlighted by a red box. The main table displays a list of diagnoses with columns for Diagnosis, Facility, Status, and Type. The table is filtered by 'VA CNTRL WSTRN MASSCHUSETS HCS'.

Diagnosis	Facility	Status	Type
POSTTRAUMATIC STRESS DIS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY
LACK OF HOUSING	VA CNTRL WSTRN MASSCHUSETS HCS	Active	SECOND
OPIOID DEPENDENCE UNSPECIFIED	VA CNTRL WSTRN MASSCHUSETS HCS	Active	SECOND
POSTTRAUMATIC STRESS DIS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY
CHR ISCHEMIC HRT DIS NOS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY
LACK OF HOUSING	VA CNTRL WSTRN MASSCHUSETS HCS	Active	SECOND
OPIOID DEPENDENCE UNSPECIFIED	VA CNTRL WSTRN MASSCHUSETS HCS	Active	SECOND
POSTTRAUMATIC STRESS DIS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY
HX RETRN MILITARY DEPLOY	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY
HYPERKINETIC SYND NOS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY
POSTTRAUMATIC STRESS DIS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	SECOND
HYPERKINETIC SYND NOS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY
CHR ISCHEMIC HRT DIS NOS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY
HYPERKINETIC SYND NOS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY
CHR ISCHEMIC HRT DIS NOS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY
OTH UNSP COUNSEL	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY
HYPERKINETIC SYND NOS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY
VACCINATION FOR DTP-DTAP	VA CNTRL WSTRN MASSCHUSETS HCS	Active	SECOND
PROPHY VACC. STREP PNEU	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY
VACCIN FOR INFLUENZA	VA CNTRL WSTRN MASSCHUSETS HCS	Active	SECOND

Users can also group the lists by certain available criteria.

*To group a list in Clinical Viewer:*

1. Select the **Sort** icon  at the top of the list.
2. Select the **Group** field, choose a category to group the information, and select the **Apply** button .

## Exhibit 8: Advanced Sort Menu – Group

The screenshot shows the HSRM Clinical Viewer interface. On the right, the 'Group' panel is open, with the 'Facility' field highlighted by a red box. The main table displays a list of diagnoses grouped by Facility. The table is filtered by 'VA CNTRL WSTRN MASSCHUSETS HCS'.

Diagnosis	Facility	Status	Type
POSTTRAUMATIC STRESS DIS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY
LACK OF HOUSING	VA CNTRL WSTRN MASSCHUSETS HCS	Active	SECOND
OPIOID DEPENDENCE UNSPECIFIED	VA CNTRL WSTRN MASSCHUSETS HCS	Active	SECOND
POSTTRAUMATIC STRESS DIS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY
CHR ISCHEMIC HRT DIS NOS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY
LACK OF HOUSING	VA CNTRL WSTRN MASSCHUSETS HCS	Active	SECOND
OPIOID DEPENDENCE UNSPECIFIED	VA CNTRL WSTRN MASSCHUSETS HCS	Active	SECOND
POSTTRAUMATIC STRESS DIS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY
HX RETRN MILITARY DEPLOY	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY
HYPERKINETIC SYND NOS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY
POSTTRAUMATIC STRESS DIS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	SECOND
HYPERKINETIC SYND NOS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY
CHR ISCHEMIC HRT DIS NOS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY
HYPERKINETIC SYND NOS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY
CHR ISCHEMIC HRT DIS NOS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY
OTH UNSP COUNSEL	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY
HYPERKINETIC SYND NOS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY
VACCINATION FOR DTP-DTAP	VA CNTRL WSTRN MASSCHUSETS HCS	Active	SECOND
PROPHY VACC. STREP PNEU	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY
VACCIN FOR INFLUENZA	VA CNTRL WSTRN MASSCHUSETS HCS	Active	SECOND

3. The list is now grouped according to the chosen category.

Exhibit 9: Conditions Page Sorted by Diagnoses

Diagnosis	Facility	Status	Type	Last Updated
CHR ISCHEMIC HRT DIS NOS	VA CNTRL WSTRN MASSCHUSETTS HCS	Active	PRIMARY	11/10/2011 10:13
CHR ISCHEMIC HRT DIS NOS	VA CNTRL WSTRN MASSCHUSETTS HCS	Active	PRIMARY	12/08/2011 08:00
CHR ISCHEMIC HRT DIS NOS	VA CNTRL WSTRN MASSCHUSETTS HCS	Active	PRIMARY	01/09/2012 08:40
HX RETRN MILITARY DEPLOY				
HYPERKINETIC SYND NOS				
LACK OF HOUSING				
OPIOID DEPENDENCE UNSPECIFIED				
OTH UNSP COUNSEL				
POSTTRAUMATIC STRESS DIS				
PROPHY VACC. STREP PNEU				
VACCIN FOR INFLUENZA				
VACCINATION FOR DTP-OTAP				

Clinical Viewer also offers a search bar on select pages to filter lists and help locate specific information.


*To use the search feature:*

1. Enter the desired search criteria into the search bar and select the **Magnifying Glass** icon (also called lookup graphic by screen readers) or the **Enter** key on the keyboard.
2. The list will filter to only show entries that match the selected search criteria.

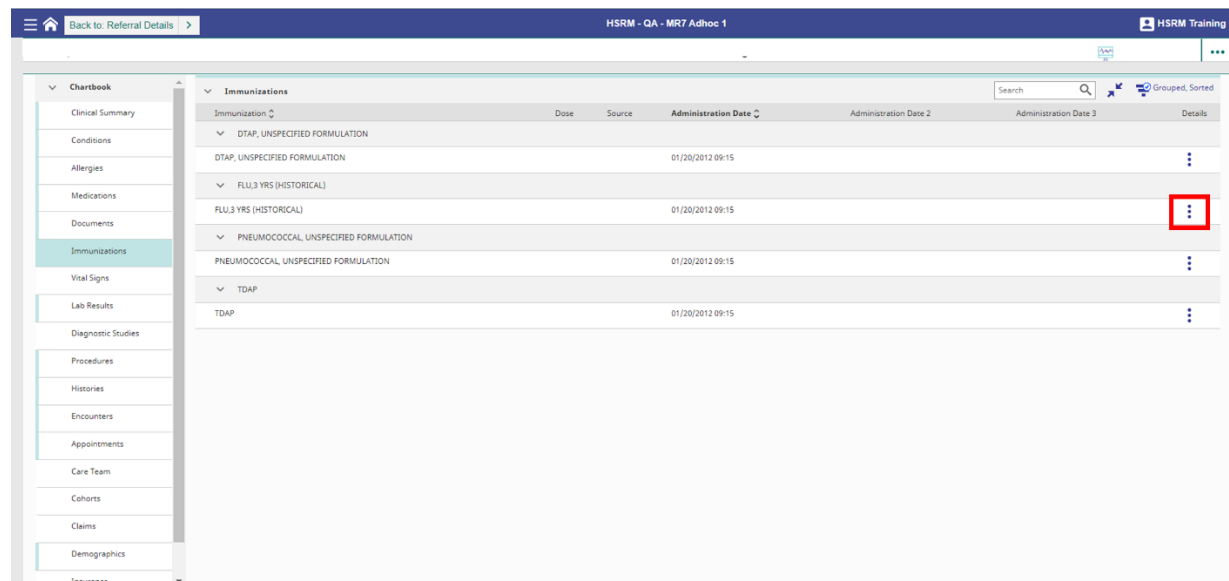
Exhibit 10: Search Bar





In addition to what displays on the screen that the user is searching, the search feature will also search within entries or records on each Chartbook list. If the user searches the word “appointment,” for example, all results in that Chartbook category that include the word

“appointment” in their title will appear, as well as any records that may not have the word “appointment” in the title but include it in their details, documents, or specific information.

Users can view specific information about each data entry or record within a specific Chartbook category. Select the **Details** icon  on the row for the specific item on the list. This allows users to view documents, details, or more specific information pertinent to the respective record in Clinical Viewer.

*Exhibit 11: Immunization Details*



Immunization	Dose	Source	Administration Date	Administration Date 2	Administration Date 3	Details
DTAP, UNSPECIFIED FORMULATION			01/20/2012 09:15			
FLU3 YRS (HISTORICAL)			01/20/2012 09:15			
PNEUMOCOCCAL, UNSPECIFIED FORMULATION			01/20/2012 09:15			
TDAP			01/20/2012 09:15			

## Help with HSRM

Community providers can request assistance with HSRM by contacting the HSRM Help Desk, opening a ticket by phone at (844) 293-2272 or by email at [hsrmsupport@va.gov](mailto:hsrmsupport@va.gov).

VA staff should contact the Enterprise Service Desk (ESD) for HSRM support. The ESD can be reached by phone at (855) 673-4357 or through the [online self-service feature](#). Tickets should be routed to the **HSRM Tier 1** queue.